

Centers for Medicare & Medicaid Services CMS Target Life Cycle (TLC)

Maryland Primary Care Program (MDPCP)

Provider Request for Application (RFA) Portal User Manual

Version 4.0 03/02/2022

Document Number: USM-9178

Contract Number: HHSM-500-2016-000691

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CMS TLC Introduction

1 Introduction

This user manual provides step-by-step instructions for using the Maryland Primary Care Program (MDPCP) Provider Portal. The MDPCP Provider Portal allows applicants to complete an application online to participate in the program.

CMS TLC Overview

2 Overview

MDPCP is a collaborative initiative between the state of Maryland and the Centers for Medicare & Medicaid Services (CMS). Care Transformation Organizations (CTOs) are a new concept unique to the MDPCP. CTOs can draw resources from or be created by existing organizations such as Accountable Care Organizations (ACOs), Clinically Integrated Networks (CINs), health plans, etc. Participating practices can select from among the approved CTOs or opt to function without the support of a CTO. We assume that participating practices will select CTOs that best meet their needs for support. For more information regarding the program, please visit https://innovation.cms.gov/initiatives/Maryland-All-Payer-Model/.

2.1 Conventions

- We indicate fields, buttons, and links for users to act on in **bold** text.
- We call out specific objects in screenshots with red outlines and arrows and provide alternative text. See Section 2.2.4 508 Disclaimer for accessibility guidelines.
- We created screenshots in Internet Explorer (IE) 11. Depending on the browser you use, your screens may vary from the examples in this manual.

2.2 Cautions & Warnings

2.2.1 Application Access Time-Out

For security reasons, you are automatically logged out of the platform if there is no application activity for more than 30 minutes. Application activity includes selecting any menu item, performing record searches, navigating through the record set, etc.

There is no auto save function. Save your updates before navigating away from the browser window.

2.2.2 Information Systems

The Information Systems warning banner provides privacy and security notices consistent with applicable federal laws, directives, and other federal guidance for accessing this government system, which includes

- 1. This computer network,
- All computers connected to this network, and
- 3. All devices and storage media attached to this network or to a computer on this network.

This system is provided for government-authorized use only.

Unauthorized or improper use of this system is prohibited and may result in disciplinary action and/or civil and criminal penalties.

Personal use of social media and networking sites on this system is limited as to not interfere with official work duties and is subject to monitoring.

By using this system, you understand and consent to the following:

 The Government may monitor, record, and audit your system usage, including usage of personal devices and email systems for official duties or to conduct U.S. Department of Health and Human Services (HHS) business. Therefore, you have no reasonable CMS TLC Overview

expectation of privacy regarding any communication or data transiting or stored on this system. At any time, and for any lawful government purpose, the government may monitor, intercept, and search and seize any communication or data transiting or stored on this system.

 Any communication or data transmitted or stored on this system may be disclosed or used for any lawful government purpose.

2.2.3 Consent to Monitoring

By logging onto this website, you consent to be monitored. Unauthorized attempts to upload information and/or change information on this web site are strictly prohibited and are subject to prosecution under the Computer Fraud and Abuse Act of 1986 and Title 18 U.S.C. Sec.1001 and 1030. We encourage you to read the HHS Rules of Behavior on the HHS website for more details.

2.2.4 508 Disclaimer

This web application and information contained therein may not adhere to Section 508 Compliance standards and guidelines for accessibility by persons who are visually impaired. If you use assistive technologies to navigate and access information, please contact the Center for Medicare & Medicaid Innovation (CMMI) Salesforce Help Desk at 1-888-734-6433, Option 5, or email CMMIForceSupport@cms.hhs.gov.

2.2.5 Technical Issues

Please contact the CMMI Salesforce Help Desk at 1-888-734-6433, Option 5, or email CMMIForceSupport@cms.hhs.gov. If you are using Microsoft® IE, please make sure the browser you are using is IE version 11 or higher, before attempting to navigate through this site. Salesforce does not support prior versions of IE.

3 Getting Started

This section contains information on set up, user access, and system navigation.

3.1 Set-up Considerations

Browser Guidelines: Salesforce is supported by:

- Microsoft® IE version 11. Prior versions are not supported.
- Apple® Safari® versions 5.x, 6.x, and 7.x on Mac OS X.
- The most recent stable versions of Mozilla® Firefox® and Google Chrome™.

Pop-up Blocker: Allow pop-up windows within your browser's settings.

3.2 Accessing the System

This section provides information on:

- New User Registration (No CMS Identity Management [IDM] Account)
- New User Registration (With CMS IDM Account)
- Existing User Verification (No CMS IDM Account)
- Existing User Verification (With CMS IDM Account)
- Resetting your IDM password
- Changing your password
- Unlocking your IDM account
- Multi-Factor Authentication (MFA)
- Logging in to the MDPCP Provider Application
- Navigate to https://app1.innovation.cms.gov/mdprov.
- The MDPCP Provider Model Application Login page displays.

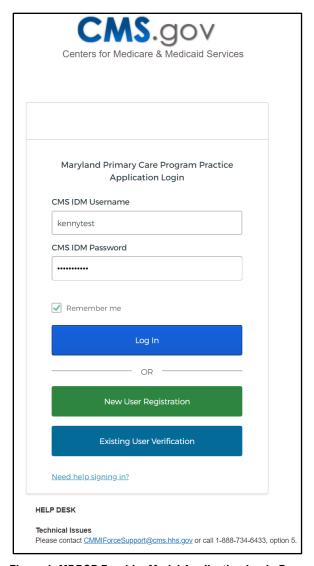


Figure 1: MDPCP Provider Model Application Login Page

3.2.1 New User Registration (No CMS IDM Account)

1. Select **New User Registration**. The Existing CMS Identity Management (IDM) Account Verification page displays.

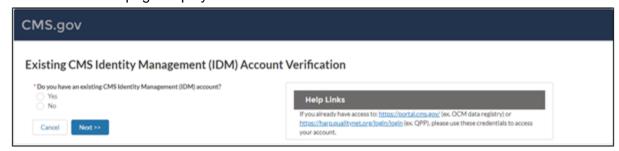


Figure 2: Existing CMS Identity Management (IDM) Account Verification

2. As a new user attempting to access the MDPCP Provider Portal, select **No**, and then select the **Next** >> button to continue. The IDM Registration page displays.

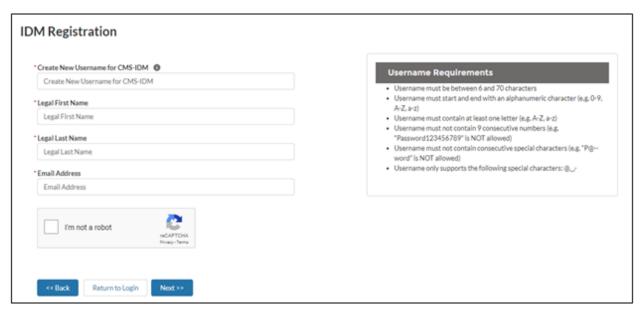


Figure 3: IDM Registration Page

3. Enter all required field(s) and select Next>>.

The success message displays for registering for CMS IDM. You will need to verify your identity through Remote Identify Proofing (RIDP). This one-time process takes 5 to 10 minutes. It requires your address, date of birth, and Social Security Number (SSN). Select the following link to learn more about RIDP: https://www.cms.gov/Research-Statistics-Data-and-Systems/CMS-Information-Technology/HETSHelp/Downloads/HETSHPGRIDPMFAFAQ.pdf.

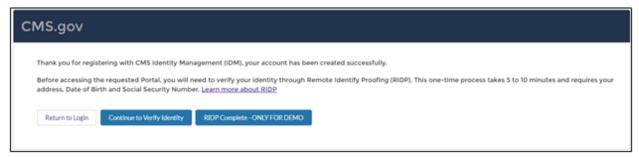


Figure 4: Successful Registration Page

4. After successful registration with CMS IDM, select **Continue to Verify Identity** to authenticate your identity. Please note that RIDP authentication is a two-step process.

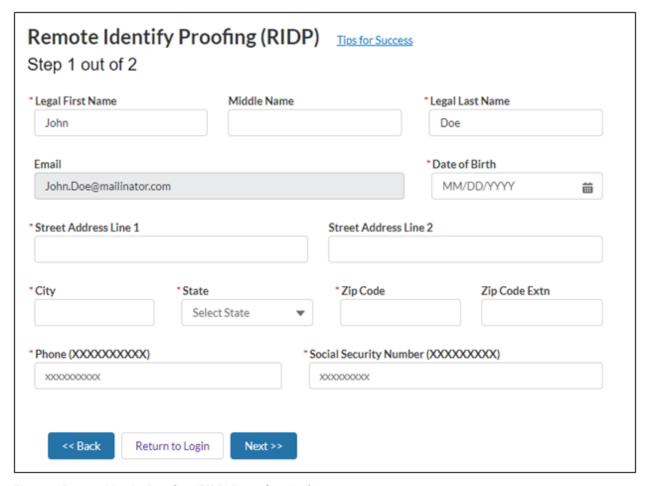


Figure 5: Remote Identity Proofing (RIDP) Page, Step 1 of 2

- 5. Enter all required information. Please note that the RIDP is the process of validating sufficient information that uniquely identifies you (e.g., credit history, personal demographic information, and other indicators). You will be asked to provide a set of core credentials including:
 - a. Full legal name
 - b. SSN (may be optional)
 - c. Date of birth
 - d. Current residential address
 - e. Personal telephone number

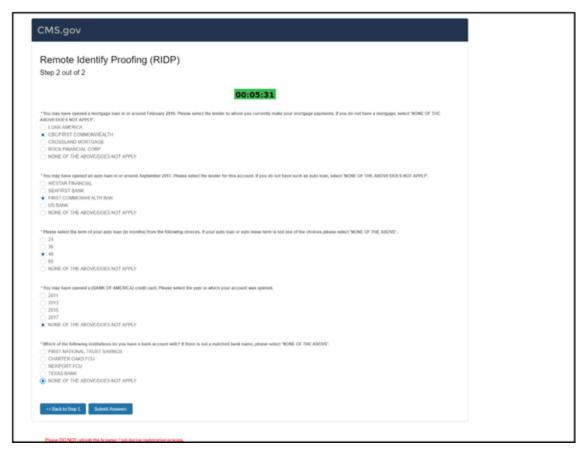


Figure 6: Remote Identity Proofing (RIDP) Page, Step 2 of 2

- 6. After successful RIDP authentication, you will receive the following two emails:
 - Activate CMS IDM Account email
 - ii. Welcome Model Community email
- 7. After you activate your account according to the instructions in the Activate CMS IDM Account email, the application will prompt you to create a password.

3.2.2 New User Registration (With CMS IDM Account)

When you already have a CMS IDM Account and do not have access to the MDPCP Provider Portal, follow these steps to gain access:

 Select New User Registration from the MDPCP Provider Portal Login page. The Existing CMS Identity Management (IDM) Account Verification page displays.

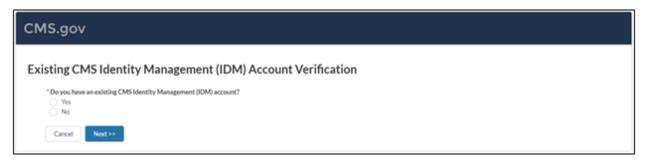


Figure 7: Existing CMS Identity Management (IDM) Account Verification Page

2. Select **Yes**, and then select **Next >>** to continue. The Existing CMS IDM Account Verification page displays.

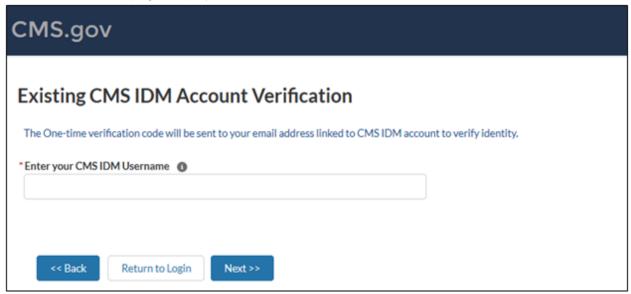


Figure 8: Existing CMS IDM Account Verification Page

- Enter your CMS IDM Username and select Next >>.
- 4. The application prompts you to enter a one-time verification code. The verification code will automatically be sent to the email linked to your CMS IDM account.

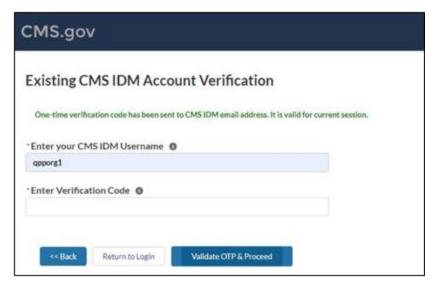


Figure 9: Verification Code

- 5. Enter the Verification Code provided in your email and select Validate OTP & Proceed.
- 6. The Salesforce System will add the MDPCP Provider Model Application Portal permissions to your account. Now you can log in using your CMS IDM credentials. You will receive a welcome email from the MDPCP Provider Model Application Portal.

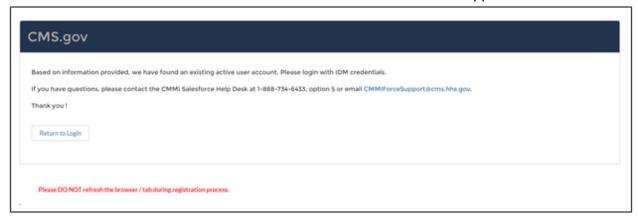


Figure 10: Successful Verification of your CMS IDM Account

7. You can now return to the login page and use your CMS IDM credentials to access the MDPCP Provider Model Application Portal.

3.2.3 Existing User Registration (No CMS IDM Account)

If you are an existing MDPCP Provider Model Application Portal user and do not have a CMS IDM account, please follow these steps to log in to the MDPCP Provider Model Application Portal:

- Select Existing User Verification from the MDPCP Provider Model Application Portal Login page.
- Select No on the Existing CMS Identity Management (IDM) Account Verification page.
 The Existing CMS IDM Account Verification page displays.

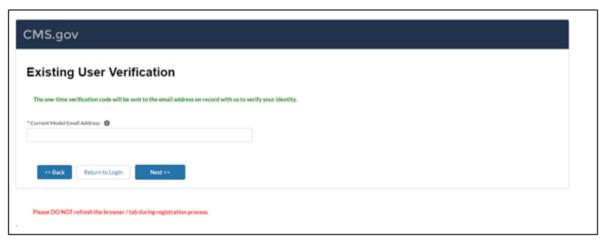


Figure 11: Existing CMS IDM Account Verification

- 3. Enter the email address you currently have associated with the MDPCP Provider Model Application. Select **Next >>**.
- 4. The application prompts you to enter a one-time verification code. Please note that the verification code will be sent to the email address you provided.
- The successful registration to CMS IDM page displays. You will receive the following two emails:
 - i. CMS IDM Account Activation email
 - ii. Welcome to the Maryland Primary Care Program Practice (MDPCP Provider)
 Model Community email

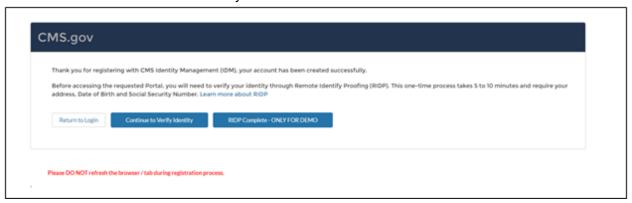


Figure 12: Successful CMS IDM Registration Page

- 6. After activating your CMS IDM account according to the instructions in the CMS IDM Account Activation email, you are required to authenticate through RIDP. Select **Continue to Verify Identity** and follow RIDP verification.
- After successfully authenticating through RIDP, the application prompts you to create a password.

You can now log in to the MDPCP Provider Model Application Portal.

3.2.4 Existing User Registration (With CMS IDM Account)

When you have a CMS IDM account and have permission to use the MDPCP Provider Model Application Portal, please follow these steps to authenticate your identity for the first time:

- 1. Select **Existing User Verification** from the MDPCP Provider Model Application Login page.
- 2. Select **Yes** on the Existing CMS Identity Management (IDM) Account Verification page. The Existing CMS IDM Account Verification page displays.
- 3. Enter your current CMS IDM account and your current model email address, then select **Next >>**.
- 4. You will be prompted to enter a one-time verification code.
 - **Note:** When you have different email addresses linked to CMS IDM and the MDPCP Provider Model Application Portal, the application will prompt you to provide two verification codes.
- 5. After verification, you will be prompted to return to the Login page. You can now log in to the MDPCP Provider Model Application Portal.

3.2.5 Resetting Your password

If you forget your password, you can reset it by selecting the **Need help signing in?** link.

- 1. Select the Forgot password? link.
- 2. The Reset Password page displays.

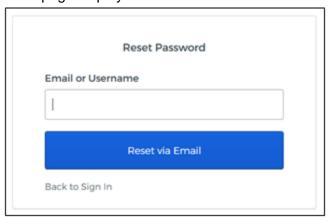


Figure 13: Reset Password Page

- 3. Enter the email or username linked to your profile.
- 4. You will receive an email to reset your password. Follow the steps provided in the email to finish resetting your password.

3.2.6 Changing Your Password

If you want to change your password, select the **Change Password** link provided on the MDPCP Provider Model Application Portal pages.

1. Select Change Password.



Figure 14: Change Password Link on Portal

1. The CMS IDM – Change Password page displays. Enter your old IDM password, new IDM password, and confirm your new IDM password.

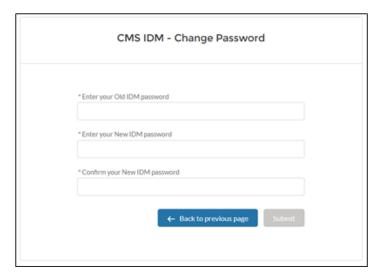


Figure 15: CMS IDM - Change Password Page

2. Select Submit.

You can now log in using your new password.

3.2.7 Unlocking Your CMS IDM account

When you have made two or more invalid attempts to log in to the MDPCP Provider Model Application Portal, your account will be temporarily locked. You can unlock your account by selecting the **Need help signing in?** link.

1. Select **Need help signing in?** and then select the **Unlock account?** link. The Unlock account page displays.

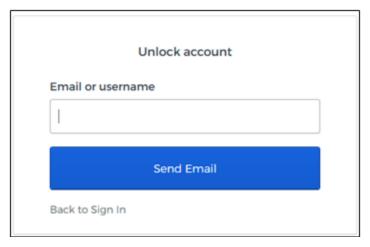


Figure 16: CMS IDM - Unlock Account Page

- 2. Enter your Email or username and select **Send Email**.
- 3. Follow the instructions in the email you receive to finish unlocking your account.

3.2.8 Multi-Factor Authentication (MFA)

After successfully logging in to CMS IDM, you are navigated to the IDM Landing page. You can set up MFA to send verification code(s) based on your selections.

1. Scroll down to the Multi-Factor Authentication section on your Profile to view the available options.

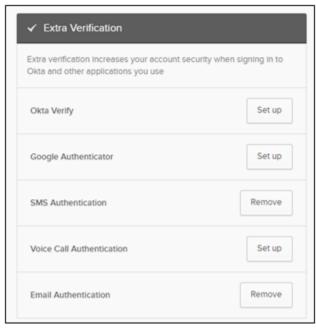


Figure 17: MFA Set Up

2. Choose your desired MFA Factor(s) and select **Set up**.

3.2.9 Logging In to the MDPCP Provider Model Application Portal

After successful registration, you are ready to log in to the Portal.

1. Access the MDPCP Provider Model Application Login page.

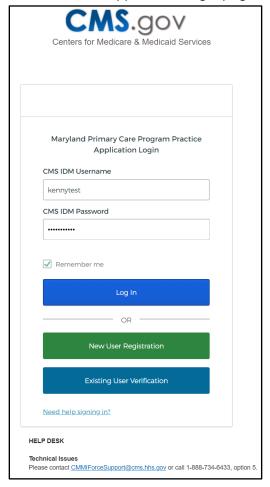


Figure 18: MDPCP Provider Model Application Login Page

- 2. Enter your CMS IDM Username.
- 3. Enter your CMS IDM Password.
- 4. Select **Log In**. The Email Authentication page displays.

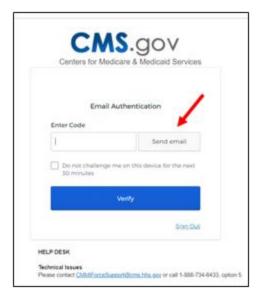


Figure 19: Email Authentication Page

- 5. Select **Send email**. You will receive an email to the email account you used when you registered for access to the Portal.
- 6. Retrieve the email and enter the one-time verification code.
- 7. Select Verify.

You will be logged in to the Portal.

3.3 System Organization and Navigation

Each portal page displays the following objects:

- A. The vertical navigation bar: select each tab to navigate to other Portal pages
- B. A Welcome <username> drop-down menu
- C. The unique application number, which is auto-generated when an application is started
- D. Save, Save & Continue, and Cancel buttons display at the bottom of the page

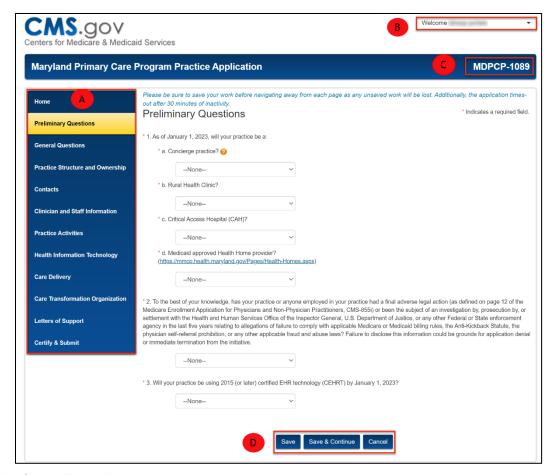


Figure 20: System Navigation

Table 1: System Organization & Navigation - Vertical Tabs

Tabs	Function
Home	Navigates to the Home page to access an existing application or Start a New MDPCP Application
Preliminary Questions	Navigates to the Preliminary Questions page to provide background information about the Organization.
General Questions	Navigates to the General Questions page to provide information about the Organization.
Practice Structure and Ownership	Navigates to the Practice Structure and Ownership page to provide information about the Organization structure and ownership of the practice.
Contacts	Navigates to the Contacts page to enter Applicant, Practice, and Health IT contact information.
Clinician and Staff Information	Navigates to the Clinician and Staff Information page to enter information about the clinicians in the practice.
Practice Activities	Navigates to the Practice Activities page to enter information about the activities that occur at the practice.

Tabs	Function
Health Information Technology	Navigates to the Health Information Technology page to provide vendor information.
Care Delivery	Navigates to the Care Delivery page to provide information about care delivery at the practice.
Care Transformation Organization	Navigates to the Care Transformation Organization page to provide information on the CTO the practice intends to partner with, if any.
Letters of Support	Navigates to the Letters of Support page to upload supporting documentation.
Certify & Submit	Navigates to the Certify & Submit page to certify and submit the application to participate in the MDPCP.

Table 2: System Organization & Navigation – Action Buttons

Action	Function
Save	Saves the current state of the fields within the application and refreshes the current page.
Save & Continue	Saves the current state of the fields within the application and navigates to the next page.
Cancel	Removes all input information since last saved.
Continue	Navigates to the next page.

3.4 User Access Considerations

This section is not applicable for this model.

3.5 User Interface

- A red asterisk (*) indicates a field is required.
- The help bubble icon reveals additional information when you hover over it.



Figure 21: Help Bubble and Asterisk

3.5.1 Welcome Menu

The Welcome <username> drop-down menu displays on every page and includes links to navigate to:

- Home page
- Change Password link
- Logout link



Figure 22: Welcome Bar Drop-Down Menu

3.6 Exiting the System

- 1. To log out of the portal, hover over **Welcome <user name>** in the upper-right corner of the screen. A drop-down menu displays.
- 2. Select **Logout**.



Figure 23: Logout Link

4 Using the System

The following sub-sections provide step-by-step instructions on how to use the MDPCP Portal's functions.

All answers are required. If you do not answer any question, an error message displays when you select **Save** or **Save & Continue** at the bottom of any page.

4.1 Home Page

The Home page contains information about the MDPCP Practice application. In addition, the Home page displays:

- A. A table of application details
- B. The Start New MDPCP Application button
- C. Your last login date and time
- D. Helpful links

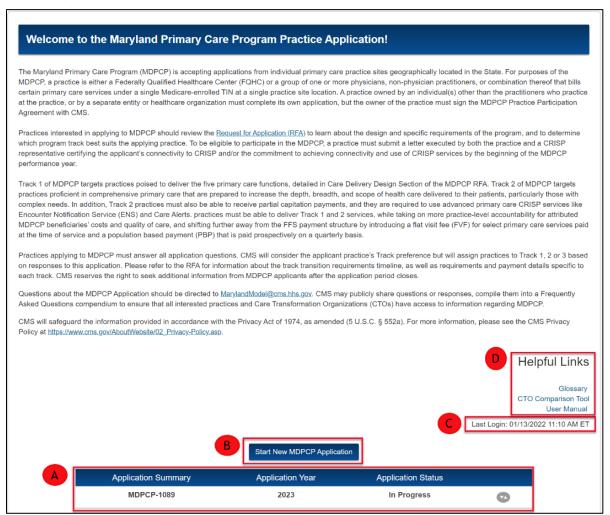


Figure 24: Home Page

Table 3 describes each helpful link on the Home page.

Table 3: Home Page Helpful Links

Helpful Link	Function
Glossary	Navigates to a new tab and displays the MDPCP Provider glossary.
CTO Comparison Tool	Navigates to the Maryland Department of Health website.
User Manual	Navigates to a new tab and displays the Provider user manual.

Table 4 describes the column headings in the new application table on the Home page.

Table 4: Home Page Table Values

Table Header	Value
Application Summary	An auto-generated application number.
Application Year	The year the application was created. Application Year displays after an application is started.
Application Status	The status of the application. For a full list of statuses, refer to Table 5.

Table 5 describes the application status visible on the Home page.

Table 5: Application Status

Status	Description
In Progress	An application was started but not completed.
Submitted	An application was completed and submitted.
Under Review	CMS is reviewing an application.
Incomplete	An application was not completed before the submission deadline.

4.1.1 Start a New Application

You can submit multiple applications. Once you start an application, it will appear in the table under the "Start New MDPCP Application" button as in Figure 25with the appropriate status.

To start a new application:

1. Select Start New MDPCP Application.

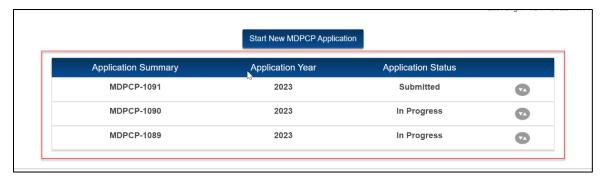


Figure 25: Start New MDPCP Application Button

2. The Preliminary Questions page displays.

4.2 Preliminary Questions

The Preliminary Questions page determines whether the organization meets the eligibility criteria to participate in MDPCP.

1. For Questions 1a through d, select an option from the drop-down menu.

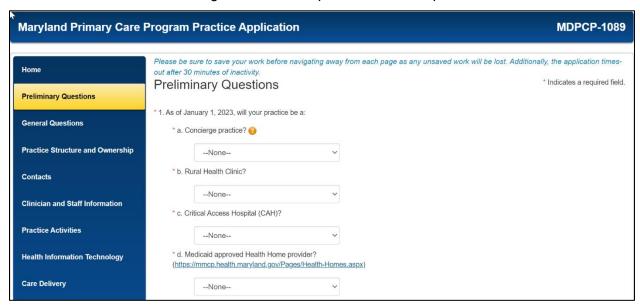


Figure 26: Preliminary Questions Page

For Question 1a:

- If you select Yes, a warning message displays.
- If you select **Continue**, the warning window closes, and you can resume the application.
- If you select Exit Application, the Home page displays. You still have access to the application.

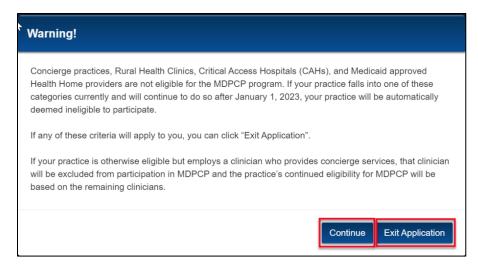


Figure 27: Warning Message for Q1a

For Questions 1b, 1c, and/or 1d, if you select Yes, the following warning message displays.

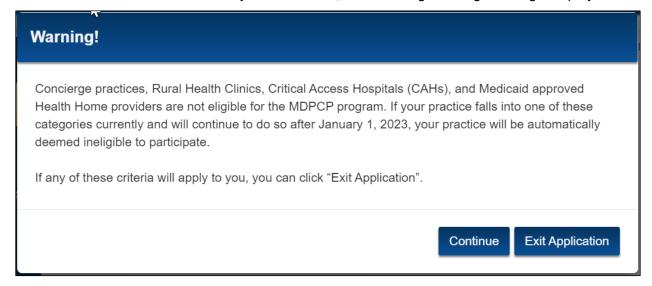


Figure 28: Warning Message for Q1b, 1c, and/or 1d

2. For Question 2, select an option from the drop-down menu.

a. If you select **Yes**, a text field displays to enter additional information within the 2,000-character limit. You must provide this information to continue with the application.

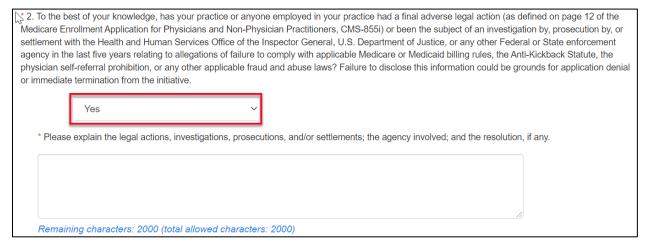


Figure 29: Preliminary Questions Page, Q2

- 3. For question 3, select an option from the drop-down menu.
 - a. If you select **Yes**, a text field displays to enter additional information within the 15-character limit. You must provide this information to continue with the application.



Figure 30: Preliminary Questions Page, Q3

4. Select Save & Continue. The General Questions page displays.

4.3 General Questions

The General Questions page gathers information about your practice's background.

1. For Question 1, select all checkboxes that apply.

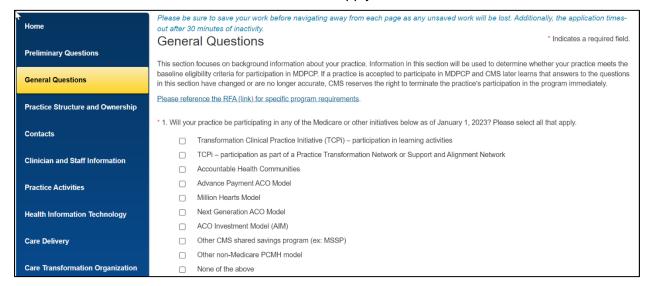


Figure 31: General Questions Page - Q1

- 2. If you select **Next Generation ACO Model** or **ACO Investment Model (AIM)**, a Warning window displays for you to enter the Planned Withdrawal Date.
- 3. Select a **Planned Withdrawal Date** from the pop-up calendar.
- 4. Select the **Continue** button. The selected date displays on the General Questions page.

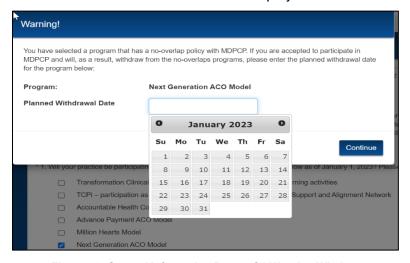


Figure 32: General Information Page – Q1 Warning Window

- 5. For Questions 2a and 2b, select or enter a response for all required fields.
 - The default value for State is Maryland.
 - You can select multiple options in County field when applicable.

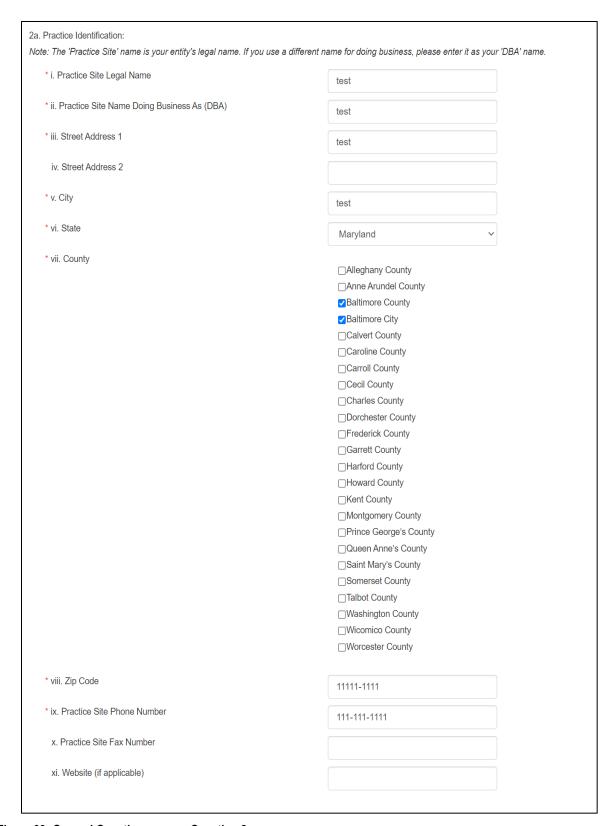


Figure 33: General Questions page - Question 2a

 When you select No for 2b, you need to specify the billing address, similar to the options in 2a.

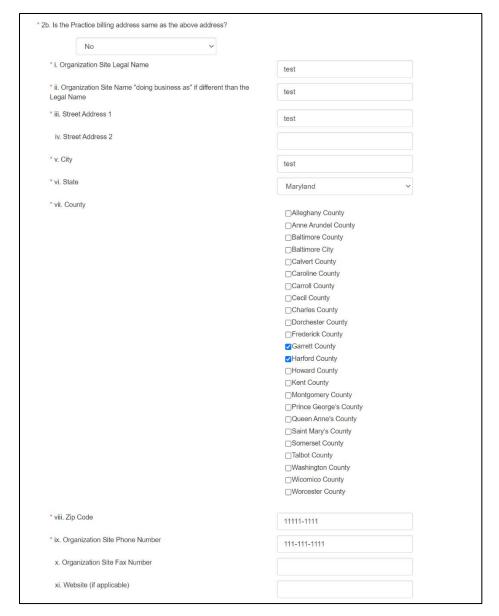


Figure 34: General Questions Page - Question 2b

- 6. For Question 3, you can select the **RFA** link to access the details specific to each track before selecting one of the following Track options:
 - Track 1
 - Track 2
 - Track 3

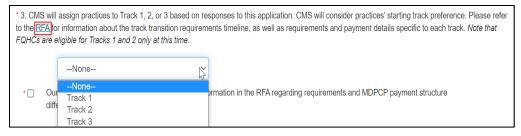


Figure 35: General Questions Page - Questions 3

Select the Checkbox after you have selected your track.

Note: You must check the box to continue.

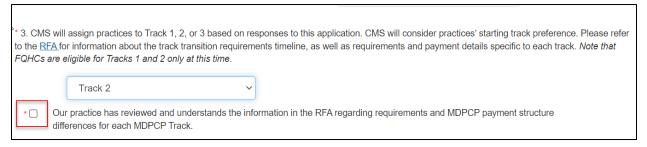


Figure 36: General Questions Page - Question 3 Checkbox

8. For Question 4, select the applicable response from the drop-down menu.



Figure 37: General Questions Page - Question 4

9. Select Save & Continue. The Practice Structure and Ownership page displays.

4.4 Practice Structure and Ownership

The Practice Structure and Ownership page asks for information about the organization's structure and ownership.

- 1. For Question 1, select an option from the drop-down menu.
 - a. If you select **Yes**, additional fields display.
 - b. If you select **No**, there are no additional fields to display.
- Enter or select a response for all required fields.

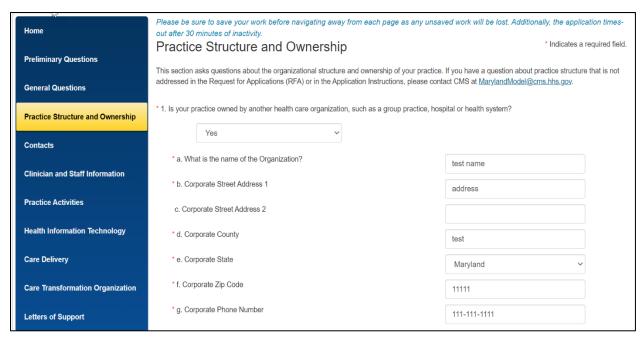


Figure 38: Practice Structure and Ownership Page

- 3. For Question 2, select an option from the drop-down menu.
- 4. For Question 3, enter the **Practice's Organizational NPI**. The NPI must be 10 numeric characters only and can contain leading zeros. Please note that the field clears out if the entry does not meet these requirements.
 - a. If you are NOT applying as an FQHC, this number can be either a CCN or a PTAN
 - b. If you are applying as an FQHC, you must provide a CCN.
- 5. For Question 4, enter your Organization's Medicare Provider number.
 - a. The Medicare Provider number is alpha-numeric and allows up to 15 characters (can contain leading zeros).

Question 4 has two sub-questions:

- 4a. Indicate if this is a CCN or PTAN.
- 4b. Indicate if it is an FQHC. (Note that FQHCs are required to provide a CCN to participate in MDPCP).
- b. If you select the PTAN option for Question 4a and Yes for Question 4b, you must enter a **CCN number**.

Please note the CCN number is alpha-numeric and allows up to 15 characters (can contain leading zeros)

6. Select **Add a New TIN** to list Tax Identification Numbers (TINs). The Add a New TIN window displays.

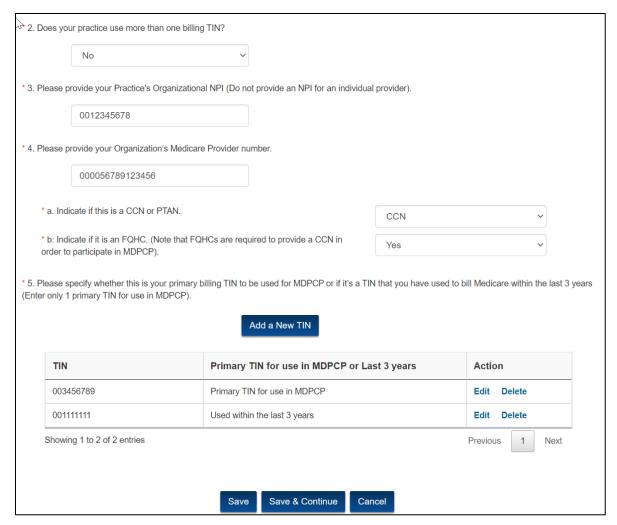


Figure 39: Practice Structure and Ownership Page

- 7. Enter the **TIN**. The TIN can contain leading zeros, but it must be exactly nine numerical characters.
- 8. Enter the TIN in Re-type TIN.
 - Select an option to specify whether this is a:
 - Primary TIN for use in MDPCP or
 - If this is an historical TIN that you have used it in the last three years, you can select **Used within the last 3 years**
 - You must select Primary TIN for use in MDPCP from the drop-down for at least one TIN value to submit the application successfully.
 - You can enter multiple billing TINs used in the past three years, but you can enter only one billing TIN as a Primary TIN.



Figure 40: Add a New TIN Window

9. Select an option to specify if this TIN is an **Employer Identification Number (EIN)** or **Social Security Number (SSN)**.



Figure 41: Add a New TIN window - Continued

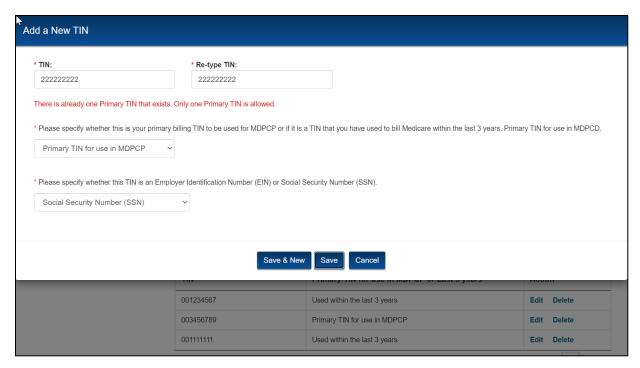


Figure 42: Add a New TIN window - TIN value errors

- 10. Select **Save** to populate the TIN in the table.
 - a. Select Save & New to enter multiple TINs.
 - b. Select Cancel to close the Add a New TIN window without saving your data.
- 11. Select Save & Continue. The TIN Verification window displays.
- 12. Select Confirm All TINS are correct to proceed.
 - a. Select **No** to verify your TIN(s) before proceeding.

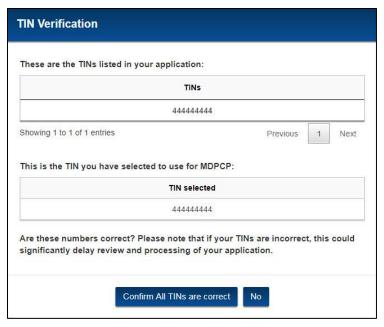


Figure 43: TIN Verification Window

The Contacts page displays.

4.5 Contacts

The Contacts page gathers information about the Applicant, Practice, and Designated Official contacts within your practice. You must provide all three contacts, though in some cases they may be the same person.

- The Practice Contact must work at the practice. This option is greyed out until you
 provide information for the Applicant Contact. If you indicate that the Practice Contact is
 the same as the Applicant Contact, the entries from the Applicant Contact will autopopulate in the Practice Contact.
- The Designated Official must have financial accountability for the practice or organization. This person should be authorized to validate or change the organization's banking information.

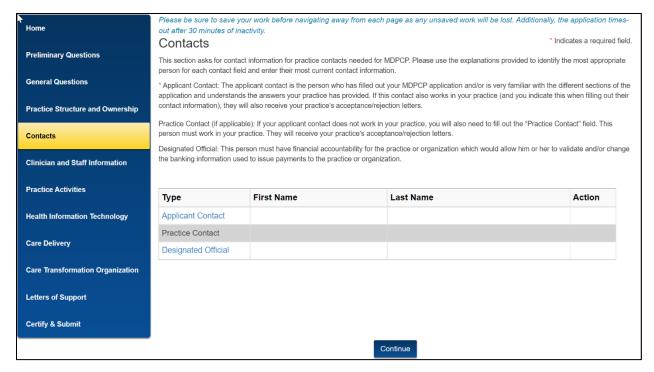


Figure 44: Contacts Page

- 1. Select the **Applicant Contact** link. The Applicant Contact window displays.
- Complete the fields as requested.
 - a. If you select **No** for Question e. Does this person work in the practice site? on the Applicant Contact window, the Practice Contact link becomes active.
 - b. If you select **Yes**, the Practice Contact link remains disabled.

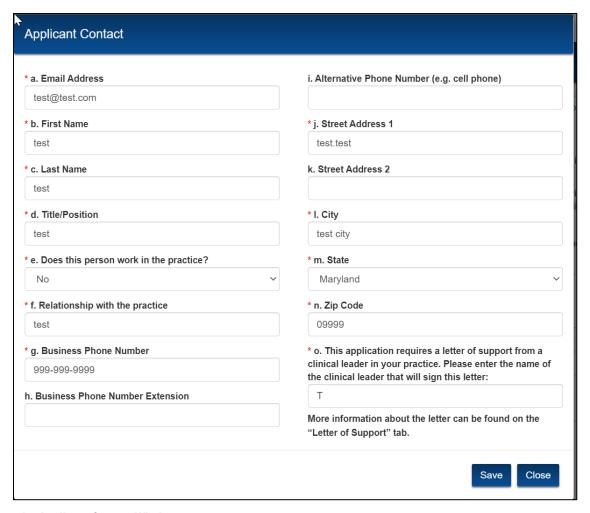


Figure 45: Applicant Contact Window

- 3. Select Save.
- 4. The Applicant Contact information displays in the Contacts table.
 - a. Select the **Applicant Contact** link to edit the contact.
 - b. Select the Clear link to delete the contact entered.

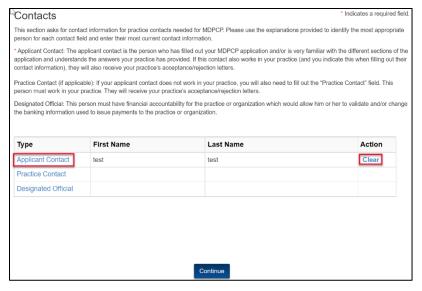


Figure 46: Contacts Page

- 5. Select the **Practice Contact** link. The Practice Contact window displays.
- 6. Complete the fields as requested.

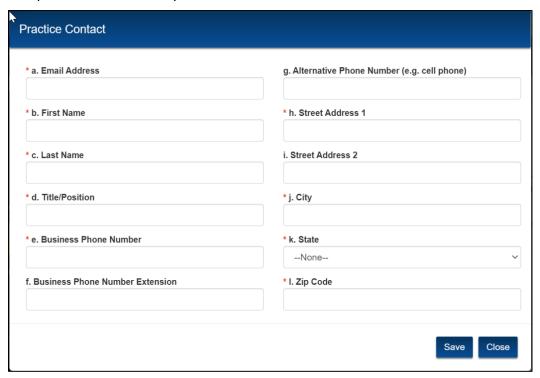


Figure 47: Practice Contact Window

- 7. Select the **Save** button to populate the information in the table.
- 8. The Practice Contact information displays in the Contacts table.
 - a. Select the **Practice Contact** link to edit the contact.
 - b. Select the Clear link to delete an existing contact.

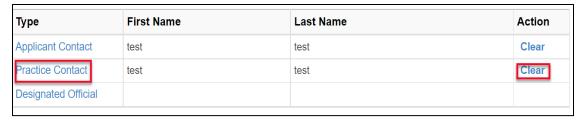


Figure 48: Practice Contact Edit/Clear link

- 9. Select **Designated Official** link. The **Designated Official** window displays.
- 10. Complete the fields as requested.

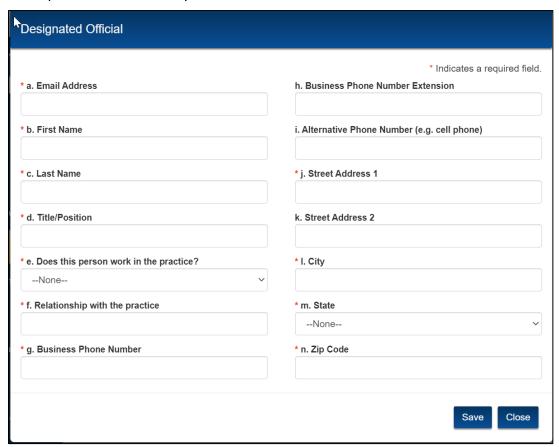


Figure 49: Designated Official Contact Window

- 11. Select **Save**. The information displays in the table.
- 12. The Designated Official information displays in the Contacts table.
 - a. Select the **Designated Official** link to edit the contact.
 - b. Select the **Clear** link to delete the existing contact.
- 13. Select Continue.

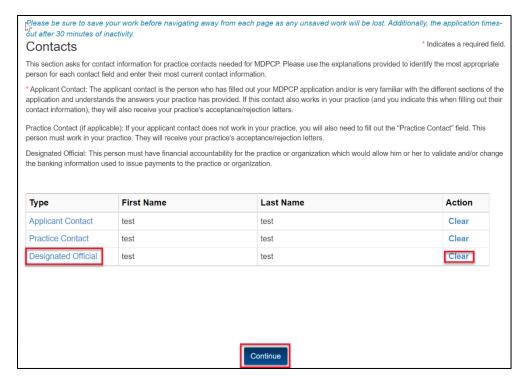


Figure 50: Contacts Page

The Clinician and Staff Information page displays.

4.6 Clinician and Staff Information

The Clinician and Staff Information page gathers information about the clinicians in the practice.

1. For Questions 1 and 2, enter a numerical value in each field. You can enter up to 3 digits only for each entry and the values for Question 2a through 2d cannot exceed the corresponding values for Question 1a through 1d.

Note: Your responses for Question 2 cannot be greater than your responses for Question 1. A warning message displays if this occurs.

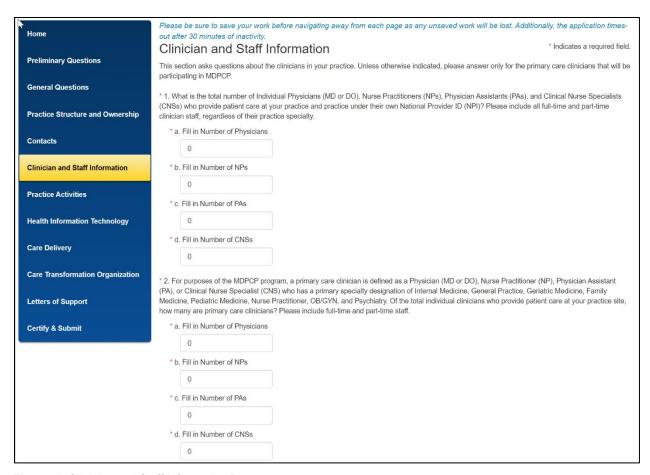


Figure 51: Clinician and Staff Information Page

2. Select **OK** to proceed.

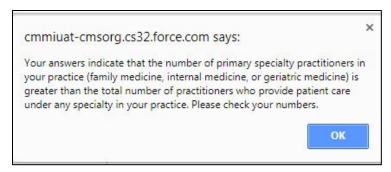


Figure 52: Warning Window

3. For Question 3, select **Add Primary Care Clinician** to add clinician information. The Clinician Information window displays.

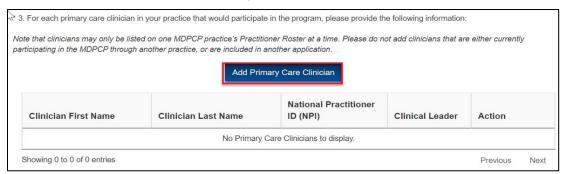


Figure 53: Clinician Information Page

4. If you select **Part-time** for Question h, a conditional question displays.

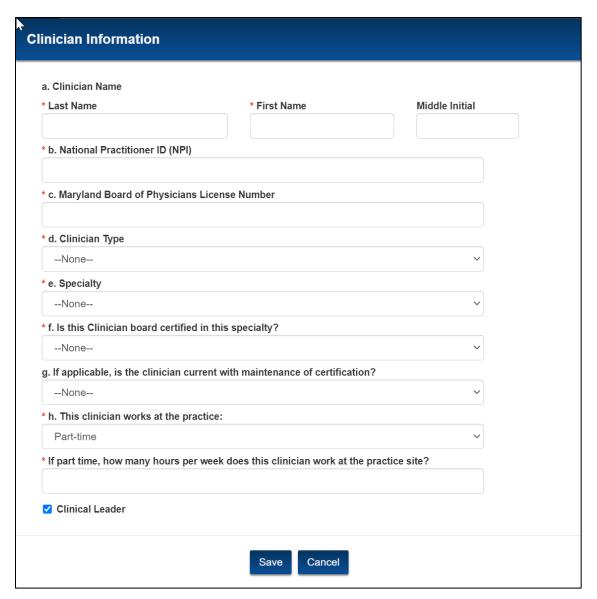


Figure 54: Clinician Information Window

5. If you select the **Clinical Leader** checkbox, a warning message displays asking you to upload a letter of support. Select **OK** on the warning message, then select **Save** in the Clinician Information window.

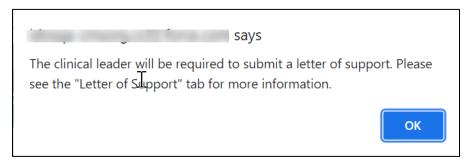


Figure 55: Clinical leader Warning message

6. The clinician information you entered displays in the table.

- a. Select **Edit** to edit the information.
- b. Select **Delete** to delete the information. Delete is a hard delete. You will not be able to retrieve information after deleting it.



Figure 56: Clinician and Staff Information Page

7. Select Save & Continue. The NPI Verification window displays.

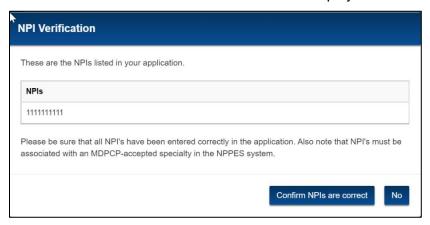


Figure 57: NPI Verification Window

- 8. Select Confirm NPIs are correct to proceed.
 - a. Select **No** to verify your NPIs before proceeding.

Note: An **NPI Verification** window will display regardless of entering any NPI information.

The Practice Activities page displays.

4.7 Practice Activities

The Practice Activities page gathers information about activities that occur at your practice.

- 1. For Question 1, select one or more options using the checkboxes.
 - a. If you select the second option, an additional field displays to make a selection.
 - b. If you select the third option, a text field displays to enter additional information within the 1,000-character limit.
- 2. For Question 2, select an option from the drop-down menu.

 a. If you select Yes, a text field displays to enter additional information within the 1,000-character limit.

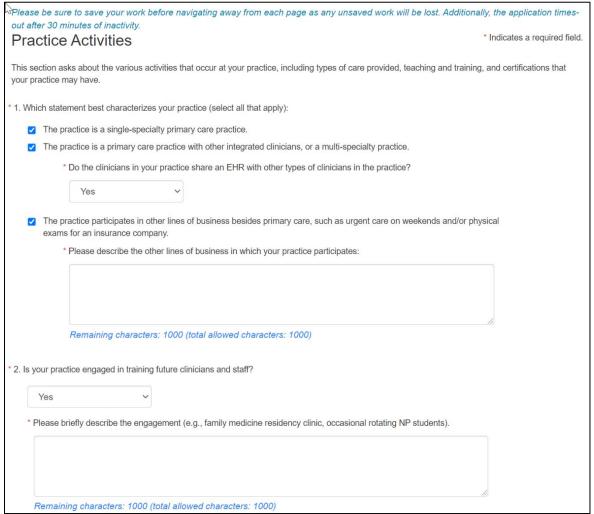


Figure 58: Practice Activities Page – Question 1 & 2

- For Question 3, select an option from the drop-down menu.
 - a. If you select **Yes**, additional options display.
 - b. Select one or more options using the checkboxes.
 - c. If you select the fourth option, a drop-down menu displays to make a selection.
 - d. If you select the fifth option, two text fields display to enter additional information.

4. If you select **Other**, a text field displays to enter additional information.

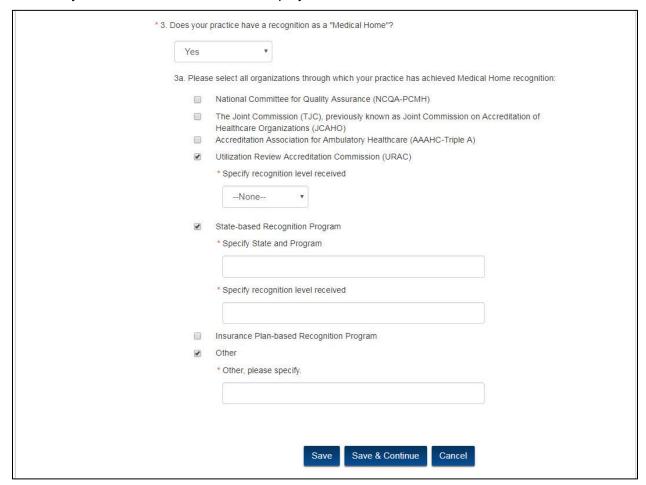


Figure 59: Practice Activities Page - Question 4

5. Select **Save & Continue**. The Health Information Technology page displays.

4.8 Health Information Technology

The Health Information Technology page gathers information about your practice's health information technology.

1. Select **New Health IT Vendor** to add vendor information.

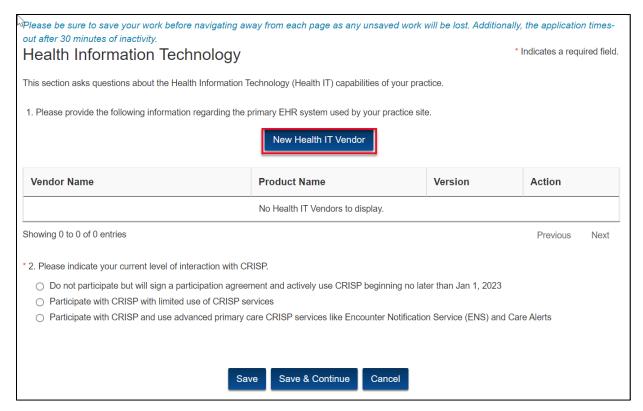


Figure 60: Health Information Technology Page

- 2. The **Health IT** window displays.
- 3. Complete the fields as requested.
- 4. Select Save.

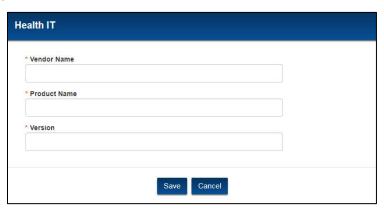


Figure 61: Add New Health IT Window

- 5. The Health IT Vendor information displays in the table.
 - a. Select **Edit** to edit the vendor information.
 - b. Select **Delete** to delete the entry. Delete is a hard delete. You will not be able to retrieve information after deleting it.



Figure 62: Vendor Table

6. For Question 2, select the appropriate option.

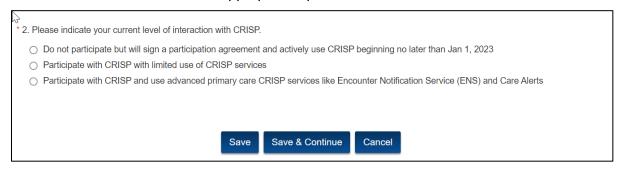


Figure 63: Health Information Technology Page

7. Select Save & Continue. The Care Delivery page displays.

4.9 Care Delivery

The Care Delivery page gathers information about the practice site's delivery of primary care.

1. For Questions 1 through 6, select the appropriate answers.

Please be sure to save your work before navigating away from each page as any unsaved work will be lost. Additionally, the application timesout after 30 minutes of inactivity.			
Care Delivery *Indicates a required field.			
The following questions gather information about your practice site's delivery of primary care. Your answers to these questions will also help determine whether your practice will be assigned to Track 1, Track 2 or Track 3 of MDPCP. Please answer the following questions based on the current activities at your practice site:			
Care Management			
* 1. Patients			
are not assigned to specific clinician panels.			
or are assigned to specific clinician panels and panel assignments are not routinely used by the practice for administrative or other purposes.			
ore assigned to specific clinician panels and panel assignments are routinely used by the practice mainly for scheduling purposes.			
 are assigned to specific clinician panels and panel assignments are routinely used for scheduling purposes and are continuously monitored to balance supply and demand. 			
*2. Non-physician practice team members			
oplay a limited role in providing clinical care.			
are primarily tasked with managing patient flow and triage.			
orvide some clinical services such as assessment or self-management support.			
 perform key clinical service roles that match their abilities and credentials. 			
* 3. The care managers used by our practice for managing the care for patients			
odoes not apply.			
are employed by another organization and located externally.			
are employed by another organization and located internally.			
are employed by our practice and located internally.			
* 4. Care Plans			
are not developed or recorded.			
are developed and recorded but reflect clinicians' priorities only.			
 are developed collaboratively with patients and families and include self-management and clinical goals. 			
 are developed collaboratively, include self-management and clinical management goals, are routinely recorded, and guide care at every subsequent point of service. 			
* 5. A standard method or tool(s) to stratify patients by risk level			
is not available.			
is available and not consistently used to stratify all patients.			
is available and is consistently used to stratify all patients and is inconsistently integrated into all aspects of care delivery.			
is available, consistently used to stratify all patients, and is integrated into all aspects of care delivery.			
*6. Follow-up by the practice with patients seen in the Emergency Department (ED) or hospital			
generally does not occur.			
occurs only if the ED or hospital alerts the primary care practice.			
 occurs because the primary care practice makes proactive efforts to identify patients. 			
 is done routinely because the primary care practice has arrangements in place with the ED and hospital to both track these patients and ensure that follow-up is completed within a few days. 			

Figure 64: Care Delivery Page – Questions 1 through 6

- 2. For Questions 7 through 9, select an option from the drop-down menu.
 - If you select **Yes** for Question 9, an additional drop-down menu displays requesting more information. You must complete this step to continue with the application.

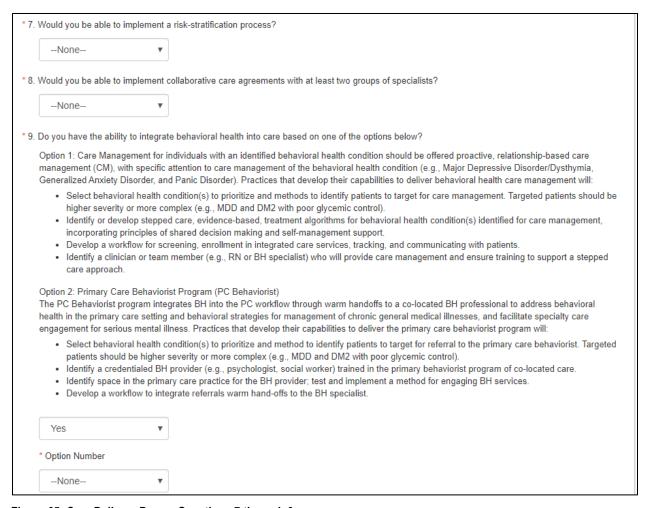


Figure 65: Care Delivery Page – Questions 7 through 9

3. For Questions 10 through 13, make selections from the drop-down menus.

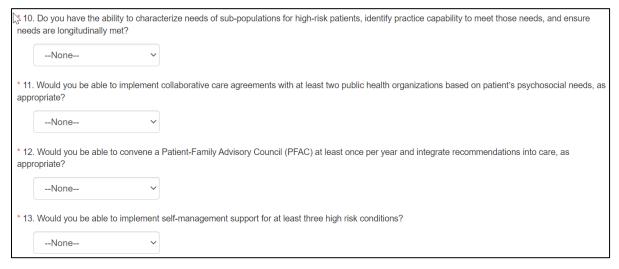


Figure 66: Care Delivery Page - Care Management

4. For Questions 14 and 15, make selections from the available radio buttons and checkboxes, respectively.

5. For Question 16, make a selection from the drop-down menu.

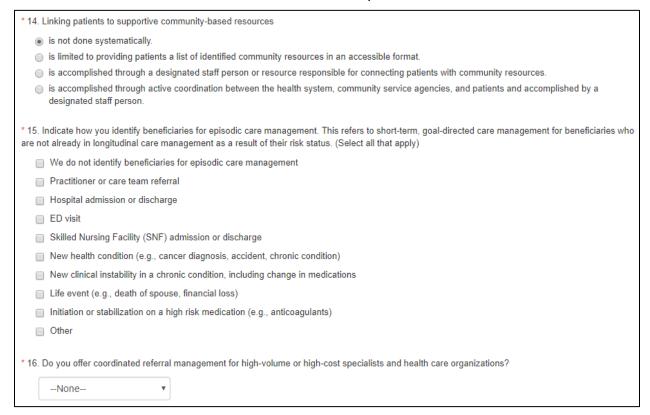


Figure 67: Care Delivery Page - Questions 14 through 16

- 6. For Question 17, select from the available radio buttons.
- 7. For Questions 18 and 19, select a value from the drop-down menu.
- 8. If you select **Yes** for Question 19, additional options display.
 - Select the appropriate answer option.
 - b. If you select **Other**, a text field displays for you to enter additional information.

9. For Questions 20 and 21, make selections from the available radio buttons.

Access					
* 17. Patient after-hou	rs access (24 hours, 7 days a week) to a physician, PA/NP, or nurse				
○ is not available	or limited to an answering machine.				
 is available from for urgent problem. 	n a coverage arrangement (e.g., answering service) that does not offer a standardized communication protocol back to the practice lems.				
is provided by a	a coverage arrangement (e.g., answering service) that shares necessary patient data with and provides a summary to the practice.				
is available via medical record.	the patient's choice of email or phone directly with the practice team or a clinician who has real-time access to the patient's electronic				
meets the needs of the	ce regularly offer at least one alternative to traditional office visits to increase access to care team and clinicians in a way that best e population, such as telemedicine, phone visits, group visits, home visits, alternate location visits (e.g., senior centers and assisted expanded hours in early mornings, evenings, and weekends?				
None	~				
* 19. Does the practice	e provide Tele-Health services? 🤡				
Yes	· ·				
* If yes, what type	of services are provided via Tele-Health?				
Tele-diagnos facilities)	is (i.e., the process whereby a disease diagnosis or prognosis is made by evaluating data transmitted between distant medical				
	oral health (i.e., using technology to virtually provide mental health services from a distance)				
	ation (i.e., virtually connecting health care clinicians with other health care clinicians and/or patients)				
 Remote Mor chronic disea 	nitoring (i.e., electronic data capture and Internet-enabled review by health care clinicians, particularly used in the management of ases)				
Other					
* Other, please	e specify:				
Quality Improve	ment				
* 20. Quality improven	nent activities				
 are not organiz 	ed or supported consistently.				
 are conducted 	on an ad hoc basis in reaction to specific problems.				
are based on a	 are based on a proven improvement strategy in reaction to specific problems. 				
o are based on a	proven improvement strategy and used continuously in meeting organizational goals.				
* 21. Staff, resources,	and time for quality improvement activities				
 are not readily 	 are not readily available in the practice. 				
 are occasionally available but are limited in scope (due to some deficiencies in staff, resources, or time). 					
,	vailable and usually at the level needed.				
are all fully ava	ilable in the practice.				

Figure 68: Care Delivery Page - Question 17 through 21

- 10. Select Save & Continue.
- 11. The Care Transformation Organization page displays.

4.10 Care Transformation Organization

If your practice intends to partner with a CTO, complete this page to allow the portal to gather information about your preferred primary and secondary CTO options from the provided list. For a CTO Comparison Tool, select the **CTO Comparison Tool** weblink. You will be navigated to https://health.maryland.gov/mdpcp/Pages/CTO-Comparison-Tool.aspx.

- Enter the Primary CTO and/or Secondary CTO by selecting the drop-down menu. The secondary CTO is a backup if the Primary CTO is unavailable.
 - a) When you select **Other (specify)** from the drop-down list, a text field displays where you can enter additional information about the CTO. It is a required field.
 - b) You cannot select same CTO for both Primary CTO and Secondary CTO.
 - c) The Program Management Office will follow up with your organization after submission to finalize the CTO pairing.

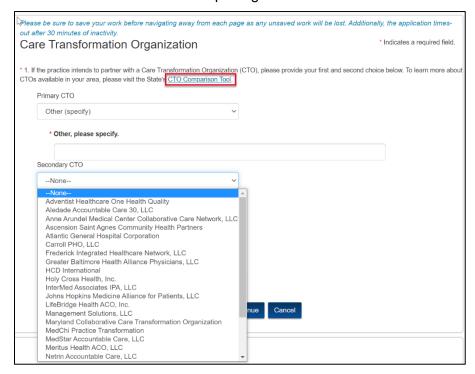


Figure 69: Care Transformation Organization Page

Select Save & Continue. The Letters of Support page displays.

4.11 Letters of Support

Two letters of support are required to submit an application:

- 1. Clinical Leadership
- Chesapeake Regional Information System for our Patients (CRISP) connectivity Tier level

To upload a letter of support:

 Select Upload Letter of Support to upload a document. The Upload Documents window displays.

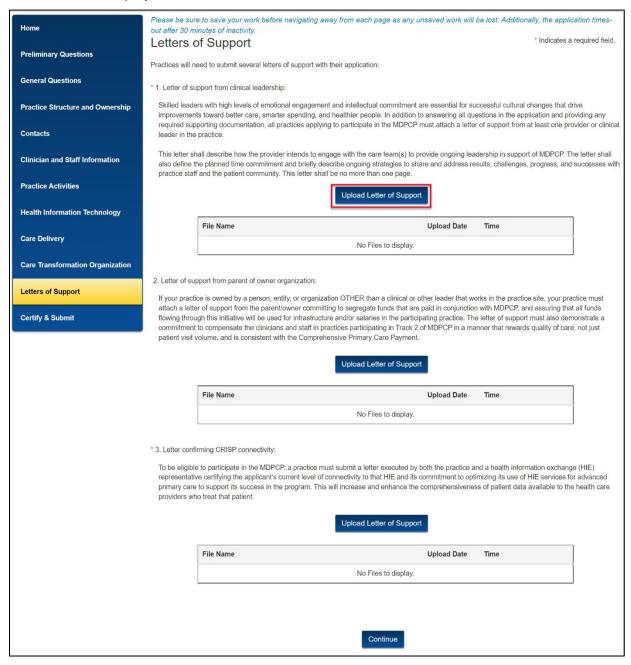


Figure 70: Letters of Support Page

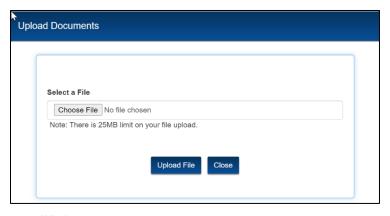


Figure 71: Upload Documents Window

2. Select **Choose File** to navigate to the file in your directory.

Note: You can only upload PDF and MS Word files.

3. Select **Upload File**. A confirmation message displays.

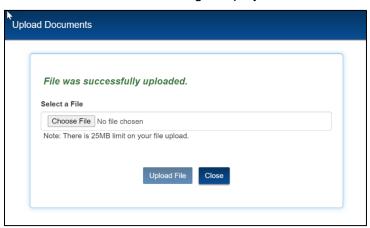


Figure 72: Upload Documents Window

- 4. Select **Close** to exit the window. The uploaded document displays in the table.
 - a. Select **Delete** to delete the document.

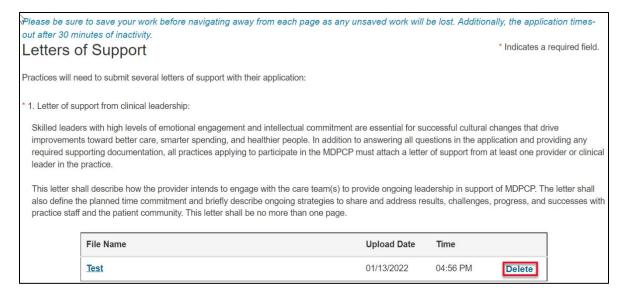


Figure 73: Letter of Support Page

- 5. Repeat steps 1 through 4 for the second and third letters of support.
- 6. Once you upload all three letters, select Continue.

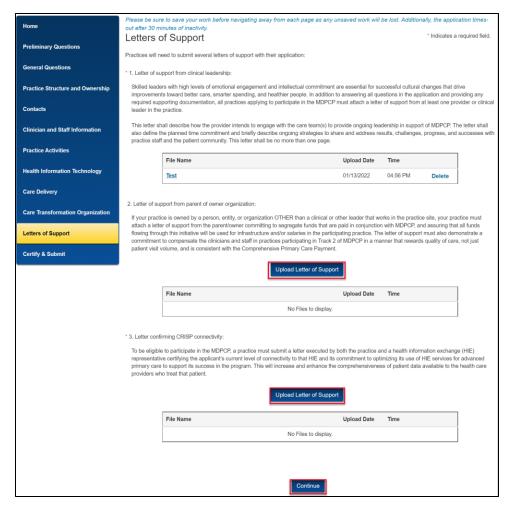


Figure 74: Upload Letters Of Support

The Certify & Submit page displays.

4.12 Certify & Submit

The Certify & Submit page allows you to preview and submit your application.

1. Select Preview Your Application to preview the application.

Please be sure to save your work before navigating away from each page as any unsaved work will be lost. Additionally, the application timesout after 30 minutes of inactivity.
Certify & Submit *Indicates a required field.
Application Checklist
Below is a checklist detailing the documents that your practice is required to submit for consideration in MDPCP. Not all documents are required from all applicants. Some documents are specific to the Track for which an applicant is applying, and some are required only from practices with specific ownership organization. It is the responsibility of the applicant to ensure that you include all documents that are required for your specific circumstances. All documents must be signed, scanned, and uploaded to the application portal. Please retain the original, signed letters. If you have any questions about what your practice is required to submit, please contact CMS at MarylandModel@cms.hhs.gov .
☐ Completed Application
☐ Letter of support from your practice's clinical leader
Letter of support from parent or owner of organization (if applicable)
Letter executed by both the practice and CRISP certifying the applicant's connectivity to CRISP and/or the commitment to achieving connectivity and use of CRISP services.
☐ I have read the contents of this application and I certify that I am legally authorized to bind the practice. Upon submission of this application I certify to the best of my knowledge that all of the submitted information is true, accurate, and complete. If I become aware that any submitted information is not true accurate, and complete, I will correct such information promptly. I understand that the knowing omission, misrepresentation, or falsification of any submitted information may be punished by criminal, civil, or administrative penalties, including fines, civil damages, and/or imprisonment.
Preview Your Application Submit

Figure 75: Certify & Submit Page

2. Select **Submit** to submit the application.

Note: The Submit button will display as disabled (in light blue) until you select the attestation checkbox. Then you will be able to select the button.

3. The Application Submission window displays. Select **Submit**.



Figure 76: Application Submission Window

4. A list of validation errors displays if you omit any required answers. Select each error to correct it.



Figure 77: Validation Errors

5. Select **Submit** again once you correct all errors. The application status is updated to Submitted on the Home page.

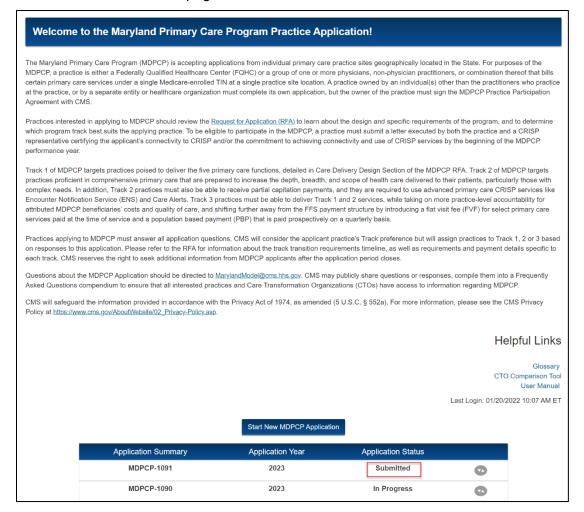


Figure 78: Home Page with Submitted Application

4.13 In Progress Application

Once you start an application, it displays in the table on the Home page.



Figure 79: Application In Progress

- 1. Select the arrow to display links to the application pages.
- 2. Select the **Application PDF** link to view a PDF version of the application.
- 3. Select any of the application page links to edit an application.
- 4. Select the **Delete Application** link to delete an existing application. You can only delete **In Progress** applications.

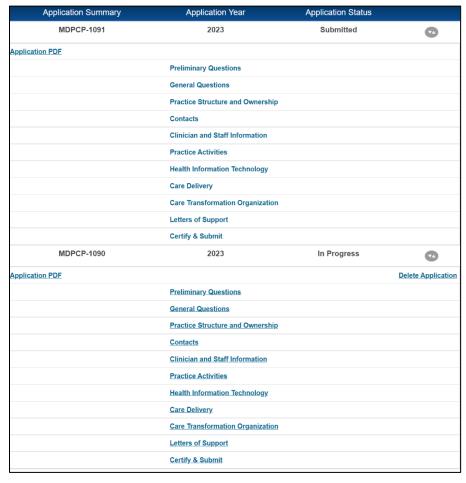


Figure 80: Application Page Links

CMS TLC Helpful Tips

5 Helpful Tips

Table 6 displays some shortcuts to help you navigate the portal website.

Table 6: Shortcut Keys

Shortcut Key	Function
Ctrl +	Zooms into your browser window and enlarges the image.
Ctrl -	Zooms out of your browser window and reduces the image.
Right-click your mouse	Additional actions display in a drop-down menu.

6 Troubleshooting & Support

Please see Section 2.2.5 Technical Issues.

6.1 Error Messages

Please see Section 4 Using the System.

6.2 Special Considerations

Not applicable.

6.3 Support

Please see Section 2.2.5 Technical Issues.

Appendix A: Record of Changes

Table 7: Record of Changes

Version Number	Date	Author/Owner	Description of Change
0.1	04/01/2019	James Patterson	Initial Version
0.2	04/09/2019	Sujatha Errapothu	Provided feedback.
0.3	04/11/2019	James Patterson	Addressed all feedback.
0.4	04/11/2019	Sujatha Errapothu	Provided feedback.
0.5	04/15/2019	James Patterson	Updated screenshots
0.6	04/15/2019	Sujatha Errapothu	Provided feedback.
0.7	04/18/2019	Jennie Cairney	QA Review
0.8	04/22/2019	Sujatha Errapothu	Accepted all QA review feedbacks.
1.0	04/22/2019	Jennie Cairney	QA Final
1.1	05/03/2020	Aneesh Joshi	ER-3 Updates
1.2	05/05/2020	Sujatha Errapothu	Peer Reviewed
1.3	05/07/2020	Theresa McWhorter	Peer Reviewed
2.0	05/14/2020	Sam Peterson	QA review, final
2.1	08/12/2020	Kenechukwu Okeke	Updated SSO procedures in Section 3 also with screen shots
2.2	9/18/2020	Debi Hensley	Peer Reviewed Section 3
2.3	02/01/2022	Bhumika Gohil	Updated as per SF-CR-1372 changes
2.4	02/03/2022	Sudheer Badlamudi	Peer review
2.5	02/04/2022	Lindsey Halsell	QA review, initial
3.0	02/07/2022	Lindsey Halsell	QA review, final
3.1	02/25/2022	Bhumika Gohil	Addressed Model team Comments with textual updates
3.2	02/28/2022	Lindsey Halsell	QA review, initial
4.0	03/02/2022	Lindsey Halsell	QA review, final

CMS XLC Appendix B: Acronyms

Appendix B: Acronyms

Table 8: Acronyms

Acronym	Definition		
ACO	Accountable Care Organization		
AIM	ACO Investment Model		
CIN	Clinically Integrated Network		
СММІ	Center for Medicare & Medicaid Innovation		
CMS	Centers for Medicare & Medicaid Services		
CRISP	Chesapeake Regional Information System for our Patients		
СТО	Care Transformation Organization		
EIN	Employer Identification Number		
FAQ	Frequently Asked Question		
HHS	Department of Health and Human Services		
IE	Internet Explorer		
MDPCP	Maryland Primary Care Program		
RFA	Request for Application		
SSN	Social Security Number		
TIN	Tax Identification Number		
XLC	CMS Expedited Life Cycle		

CMS XLC Appendix C: Glossary

Appendix C: Glossary

This section is not applicable.

Appendix D: Referenced Documents

This section is not applicable.

CMS XLC Appendix E: Approvals

Appendix E: Approvals

The undersigned acknowledge that they have reviewed the User Manual and agree with the information presented within this document. Changes to this User Manual will be coordinated with, and approved by, the undersigned, or their designated representatives.

Table 9: Approvals

Document Approved By	Date Approved
Name: <name>, <job title=""> - <company></company></job></name>	Date
Name: <name>, <job title=""> - <company></company></job></name>	Date
Name: <name>, <job title=""> - <company></company></job></name>	Date
Name: <name>, <job title=""> - <company></company></job></name>	Date